

## Voluntary Income Tax Assistance (VITA) Program: General Volunteer

### Purpose:

The VITA General Volunteer will provide customer support services to individuals in need of tax preparation services and assist with miscellaneous administrative tasks in accordance with VITA services. The volunteer will welcome and screen taxpayers to determine the type of assistance they require; confirm they have the necessary documents to complete their tax returns; answer general questions; and provide clerical support for the tax preparers, site coordinator, and/or tax instructor.

### Agency Contact:

- For more information or to apply contact Volunteer Services [volunteer@camarin.org](mailto:volunteer@camarin.org)

### Responsibilities and Duties:

- Greet and answer general questions for individuals that request taxpayer services from the Agency.
- Not eligible to answer any tax-related questions.
- Help set up/take down onsite facilities with office supplies and office equipment including photocopiers, scanners, and printers.
- Manage traffic and entry areas on-site to maintain the flow of taxpayers according to site operational procedures.
- Provide taxpayers with intake forms, determine the tax assistance needed, and ensure taxpayer has brought all required documents to complete their tax return.
- Complete and distribute production records to customers and taxpayers.
- Scan and/or photocopy documents.
- Monitor, maintain and operate office equipment.
- Adhere to IRS Quality Site Requirements, including maintaining taxpayer privacy and confidentiality standards, and code of conduct.
- Communicate with clients in a respectful and responsive manner to differing beliefs and practices, sexual orientations, disability status, gender identities, ages, cultural preferences, language needs, and other state and the federal government protected statuses.

**Time Commitment:**

- Online training program to be completed prior to January 2025.
- 4 hours/day once a week from January to April 2025.

**Required Skills and Qualifications:**

**Skills:**

- Ability to engage with the public in a positive and productive manner.
- Provide necessary support to the VITA team with dedication to the mission and vision of the Agency.
- Strong customer service and written and verbal communication skills.
- Ability to operate photocopier and scanning equipment.

**Qualifications:**

- Complete all IRS training requirements: Volunteer Standards of Conduct, Intake/Interview and Quality Review, and the Volunteer Certification System.
- Proficient in English; and proficiency in Spanish desired.
- Willingness to provide a pleasant and welcoming environment.
- Adapt well to a dynamic, fast-paced environment and work effectively with a team.
- Tax law certification **is not** required.

**Volunteer Benefits:**

- Help fellow community members who need tax preparation assistance.
- Free IRS Certified Training.
- Letters of reference (volunteers with long-term commitments).
- Assist Community Action Marin aligning to the Agency's whole-family approach.

**Location:**

- Community Action Marin Main Office: 555 Northgate Drive, San Rafael

**Reasonable Accommodations:**

This opportunity may involve physical demands (e.g., climbing stairs, carrying, lifting etc.) as these actions are essential to the role. Reasonable accommodations may be provided for individuals with disabilities to perform essential functions.